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PRACTICE AREAS

PRIVATE WEALTH & TRUST SERVICES
Estate, Trusts, & Wealth Planning

OFFICE

Vienna, VA

DUNLAP BENNETT & LUDWIG

GEORGE REILLY

OF COUNSEL

George Reilly provides comprehensive estate planning services to his clients, with a special focus on the coordination of tax and financial planning into estate plans. In addition to more than 39 years as an attorney, George has extensive experience and advanced education in tax matters, and is also a Certified Financial Planner® professional, a designation shared by only about 5% of attorneys in the United States. We refer to this distinctive coordination of our client's legal, tax, and financial planning matters as Peace of Mind planning.

George began his career as an officer in the Navy Judge Advocate General's Corps serving the legal needs of Sailors, Marines, and their families for more than 22 years. His Navy JAG experience taught him the importance of everyone, regardless of their net worth, having at least an essential legal readiness estate plan, a concept he calls "Having a plan in place for the just in case!"

Originally from Long Island, New York, George earned his bachelor's degree from Manhattan College and his law degree from Saint John's University School of Law. George later earned a Masters-in-Law degree from George Washington University School of Law with a specialization in income taxation and estate planning.

During his Navy career George served as the Navy's Tax Counsel during three separate assignments. In that position he represented the interests of Navy leadership as well as Sailors, Marines, and their families with respect to tax legislation, regulations, and policy. He also did extensive writing and teaching on such topics as income and estate taxation, estate planning, legal readiness, and financial planning, and was a frequent presenter on these topics for all branches of the military, as well as providing training to IRS personnel on military-specific tax issues.

Following his active-duty career George served for several years as a civilian attorney and inspector for the Navy and Department of Defense. He then formed his own firm where he first established the comprehensive service model that became known as Peace of Mind Planning to address the life and estate planning needs of his clients in Northern Virginia, Maryland, and the District of Columbia. This unique approach involves the integration of the estate planning process with a client's financial situation as well as seeking out opportunities for tax planning.

For some clients George can provide guidance on all aspects of this planning, but for many clients he recommends that a client's other trusted professionals for taxes, financial planning, business planning, and other subject areas as appropriate work together in a collaborative manner to provide the best possible outcome for the client. Clients appreciate that they can be assured that all of their advisors are rowing in the same direction on their behalf and working out to the extent practicable the various, and sometimes at odds, aspects of their financial and personal lives and goals.

With his extensive experience in this coordinated estate and tax planning approach, George has become a nationally recognized presenter on complex legal and financial issues, with a particular focus on the challenges of planning for individual retirement accounts (IRAs) and employer retirement accounts in estate planning given the significant changes in tax law since 2020. Large retirement accounts pose a significant challenge for many clients in determining how best to address their legacy planning goals while seeking to protect hard-earned wealth by using tax efficient planning tools. We help our clients create comprehensive estate plans that provide the best possible outcome for retirement accounts and other assets to achieve their legacy goals.

EDUCATION

- B.A., Manhattan College
- LL.M. (Taxation), George Washington University School of Law
- J.D., Saint John's University School of Law

ADMISSIONS

- Virginia
- Maryland
- District of Columbia
- United States Supreme Court
- United States Tax Court

EXPERIENCE

- George has nearly 40 years of legal experience, with most of his client work focused on estate, tax and financial planning matters. Over his career George determined that, much like doctors who establish particular expertise in one aspect of medicine, he should similarly narrow the scope of his practice, and at DBL George exclusively provides estate planning and related services to his clients.
- He has prepared thousands of estate plans, from essential Young Family or “Young at Heart” legal readiness plans, to complex plans for ultra-high net worth clients who needed sophisticated tax and financial planning, and for many others in-between who needed comprehensive, but not necessarily complex planning.
- He is a firm believer that clients with more complex personal and financial situations should have their trusted advisors working together on their behalf in a collaborative approach. His education and experience in tax and personal financial planning enables George to work very effectively with a client’s other professionals.
- A firm believer in client education and a sought-after speaker, George has given numerous noteworthy presentations to the public and to other professionals on topics including, among others, essential estate planning basics, planning for second marriages and blended families, tax-efficient planning for high net worth clients, and more recently, the significant changes in the law for inherited retirement accounts and the tax and other consequences of planning for IRAs in estate plans.
- As part of his focus on education, George has written several magazine articles on topics such as estate planning for blended families, the intersection of financial and estate planning, and using practical planning tools such as the DBL Peace of Mind Roadmap Organizer to help your family best help you in the event of an emergency.

PROFESSIONAL ASSOCIATIONS AND MEMBERSHIPS

- Certified Financial Planner(TM) Professional
- Northern Virginia Estate Planning Council